

FINDING CORPORATE FUNDERS: THE ART OF SUCCESSFUL RESEARCH

**San Francisco Fundraising Summit
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Anne Kirwan, Upwardly Global; Don Brown, Fort Mason Center

Outcomes for the Session



Participants will be able to:

- Identify and access sources of corporate funding appropriate to your organization
- Clearly and concisely speak to your mission statement and articulate your case for funding
- Identify and build relationships with corporate executives and corporate foundations
- Identify employer “champions”

Introducing the Panel

- **Cheryl Dettrick, Independent Grant Development Consultant**
 - ▣ **Resource Development Services, Central Coast, CA**
- **Anne Kirwan, Managing Director (Bay Area)**
 - ▣ **Upwardly Global, San Francisco, CA**
- **Don Brown, Director of Major Gifts**
 - ▣ **Fort Mason Center, San Francisco, CA**

Learning about Corporate Funders

- **Corporate foundations**- give to regions where company operates; non-profits where employees are involved

VS.

- Foundations-clear about interests; philanthropic
- Government-state priorities; political relationship is important (DFC Grant)

Corporate Funders

- Priorities are less clear ; do not have to give
- Types-gift/match, use of facilities, technical assistance, volunteers, in-kind equipment/materials, publicity
- Reasons-create community goodwill; personal involvement in non-profit; support company employees; corporate gain

WHY Corporations Give

- ▣ Mandated by charter
 - ▣ Mission of company or foundation
 - ▣ Good Public Relations
 - ▣ Direct-giving programs, Private foundations, or both
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- ▣ Public
 - ▣ More requirements, objective standards
 - ▣ Private
 - ▣ Less requirements, subjective standards

Understand Corporate Giving

- Are not separately incorporated and do not adhere to private foundation laws or regulations or file a Form 990-PF.
- Enable the corporation to deduct up to ten percent of its pre-tax income.
- Corporations give to nonprofits whose programs benefit the communities where their employees live and work.
- Corporate support can be cash grants or in-kind gifts.

Key Phases to Corporate Funding

- ▣ **Prospecting** for corporate funding
- ▣ **Cultivation** of corporate relationships
- ▣ **Applying** for funding
- ▣ **Minding** Corporate Relationships

Prospecting for Corporate Funding

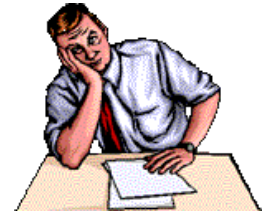
- Know how to identify corporate foundations and funders whose objectives fit with your organization's mission
- Know how to identify individual champions within corporations

Prospecting



Researching and Approaching Funders

- Interest in supporting programs in your geographic area
- Interest in the subject area of your project
- Enough time to do your research



- What are the goals and needs of your organization?
- What are your organizational competencies / strengths?
- Does your organization have the support systems to secure the funds?
- Do you have really sellable ideas?

Creating a Prospect List

Examine descriptive profiles and recent giving histories

- supported projects similar to yours?
- award the type of support you seek?
- located in, or typically award grants in your geographic area?



Cultivating Corporate Relationships

- Know how to create opportunities for interaction with potential corporate funders
- Establish relationship prior to asking for funds
- Market your program; invite to events
- Time your proposal based on giving cycle
- Ask for in-kind gift first

Applying for Corporate Funding

- Know how to access the people and resources necessary to craft a compelling and successful proposal



The screenshot shows the homepage of the Foundation Center's Corporate Giving Online platform. The header features the Foundation Center logo with the tagline 'Knowledge to build on' and the title 'CORPORATE GIVING ONLINE'. Below the header, a banner image shows a family. The main text promotes 'Get the competitive edge with immediate, 24/7 access to America's leading corporate funders.' It states that the platform is updated weekly and is the fastest, most accurate path to corporate funds and resources. A 'Log in to search:' section lists four bullet points: 'More than 3,700 detailed company profiles', 'More than 2,700 company-sponsored foundations', 'Nearly 1,400 direct corporate giving programs', and 'Nearly 100,000 recently awarded grants'. On the left, there is a login section for 'CURRENT SUBSCRIBERS LOG IN' with fields for 'User name' and 'Password', and an 'Enter' button. A link for 'Trouble logging in?' is also present. On the right, there are three buttons: 'LEARN MORE', 'GUIDED TOUR', and 'SUBSCRIBE'. The bottom of the page has a footer with the text 'Take the corporate approach to get the support your organization needs.'

FOUNDATION CENTER
Knowledge to build on

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Take the corporate approach to get the support your organization needs.

CURRENT SUBSCRIBERS LOG IN

User name:

Password:

Trouble logging in?

Fine Art of Shmoozing



- Information, information, information
- Make early contact in the proposal process
- Know who you are dealing with
- Complement – with sincerity
- Make them aware of who you are
- Make them aware of how you “fit” with them
- Create a personal connection
- Keep them informed about what you are up to,
but do not badger

Program Elements



Letter proposal /Letter of Intent

- Describe the nature of the project and how it will be conducted;
- Include the timetable for the project;
- Describe the anticipated outcomes and how best to evaluate the results;
- Outline staffing and volunteer needs, including deployment of existing staff and new hires.

Identify What You Need

BUDGETING

- *New writers FEAR*
- *Experienced writers ENJOY*

NEGOTIATE TERMS

- Budget is rarely the final one
- Consider matching support (in-kind contribution)

Know the *Mutual* Needs of Partners

- ☐ Training
- ☐ Equipment
- ☐ Facilities
- ☐ Research
- ☐ Technology
- ☐ Business Partnerships
- ☐ Operations



Identify Matching Funds

- Administrator's time
- Off site locations
- Partnerships with businesses
- Donated equipment
- Volunteer time
- Space used
- Equipment used on site



Disseminate Results

- Who else will benefit from your project?
- Who else can adapt or adopt model?
- Expect to provide copy of results or product to funder (build into budget)
- Develop effective marketing plan once project is complete

Minding Corporate Relationships

- Build a long-term and mutually beneficial relationship
 - ▣ address both your organization's need for support and corporate interests

Future Funding

- ▣ Convey to the reviewer what mechanisms are in place to guarantee the continuation of the project
- ▣ Present a plan to provide future funding if the program is to be continued or self-sustaining
- ▣ Discuss plans for care and maintenance of equipment



Contact Information

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